

COUNTY OF ORANGE

ORANGE COUNTY PUBLIC LIBRARY

2004 BUSINESS PLAN



December 22, 2003



Orange County Public Library

1501 E. ST. ANDREW PLACE, SANTA ANA, CA 92705 (714) 566-3000

JOHN M. ADAMS
COUNTY LIBRARIAN



To the Patrons, Partners and Friends of the Orange County Public Library:

During Fiscal Year 2002-03, Orange County residents provided their public library system with financial support of approximately \$18 per capita, which placed the Orange County Public Library (OCPL) in the lowest third of public libraries in the State for costs. What did OCPL users get for their money? Consider that:

- ◆ Our customers borrowed over 6.5 million books, videos, compact discs and other items from their libraries. At an average cost of \$15 per item, this represents a value of \$97,500,000.
- ◆ Library staff answered 1.68 million reference questions for users. At the \$5 per question fee charged by the online provider Google for similar services, this represents a value of \$8,400,000.
- ◆ 162,000 persons attended library programs (including 132,000 children at story-times, puppet shows and other events). At an average cost of \$7.50 for attendance at a movie, this represents a value of \$1,205,000.
- ◆ Library users logged on for 450,000 hours of Internet use at OCPL branches. At the \$3 per hour rate charged by local "cyber cafes", this represents a value of \$1,350,000.
- ◆ Community groups held 3,241 meetings in library meeting rooms. At an average room rental rate of \$100 per meeting, this represents a value of \$324,100.

So from just the items listed above, Orange County residents received a value of almost \$110,000,000 for an investment of less than \$30 million!

In 2004, the men and women of OCPL will continue to offer information and services to our community at an even higher level. After opening new library branches in Foothill Ranch and Ladera Ranch in 2003, we will begin construction of a new library in Irvine in 2004. We will also be improving our new, state of the art computer system which will provide enhanced user services and features on a "24/7" basis.

Finally, the caring, personal attention and responsiveness to customer needs that has been a hallmark of the staff of OCPL will continue in future years.

On behalf of the OCPL staff, it is my great pleasure to present this Business Plan for 2004 for the Orange County Public Library.

Sincerely,

John M. Adams
County Librarian

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I. EXECUTIVE SUMMARY

"To enhance the quality of life for County residents by offering access to information and other resources for leisure opportunities, learning, business and community interaction."

- Orange County Public Library Mission Statement

The 2004 Orange County Public Library (OCPL) Business Plan presents an agenda for preservation and some improvement of the library services delivered to the public. Despite State economic problems, the organization is in a position to proceed on a relatively stable footing in future years to the benefit of Orange County residents.

Established in 1919 under State Statute by the Orange County Board of Supervisors, OCPL provides library services to residents of 24 cities and the unincorporated area. OCPL's primary revenue source is the local property tax, distributed according to state legislative dictate. OCPL operates under the authority of the Board, with recommendations to the Board regarding policy and budget issues being provided by the Library Advisory Board, which includes as representatives elected officials from the 24 OCPL member cities.

In Fiscal Year 2002-03, the OCPL operating budget totaled \$28,381,933 with an additional \$7,434,686 in the Capital Fund. OCPL fulfills its mission of providing public library services by offering information resources, professional assistance in using those resources, and access to other information sources for library users. Special programs for children and adults, adult literacy training, and community center functions are also part of OCPL's service program. OCPL operates under an organizational structure in which nine functional areas report directly to the County Librarian.

OCPL currently operates 31 libraries and a headquarters facility, and an advanced automated system provides users with library and general information both in libraries and from remote locations. A number of OCPL functions – from cataloging to janitorial services – have been privatized. The current population served by OCPL is nearly 1.5 million persons. Branch library operations are funded based on an allocation formula that includes tax payments to the Library Fund as a major factor.

In FY 2004-05, OCPL will undertake major actions in almost every area of operations to increase and improve customer services. Citizen access to information (both printed and in electronic formats), branch physical improvements, and service program improvements, are all planned to be the subjects of significant changes and enhancements.

Recognizing that provision of information to residents is OCPL's core business, efforts in FY 2004-05 will focus on the need to provide that access in the most effective and contemporary manner possible. Public access to the Internet, first offered in all branches

in 1998, will be enhanced based on overall demand for access in each branch; fuller use of Internet by the staff assisting the public will also be provided. Actions taken to assure that Internet access for minors will be as safe from objectionable matter as is technologically possible will continue.

Full integration of the new (2003) OCPL automated system with state of the art technology will also be achieved, including direct text database access for Internet users via the OCPL Website and the introduction of wireless “wi-fi” connectivity at branches. At the same time, the collection of print materials will be expanded to meet the continuing public demand for new books.

Library branch facilities will receive attention in the coming year. A four-year program to achieve compliance with the Americans with Disabilities Act was completed in 2003, and two new branches were opened in Lake Forest and Ladera Ranch. Construction will be completed on the Wheeler branch library in Irvine in FY 2004-05.

Internal operations and efficiency will be improved by a series of actions including: expansion of a comprehensive training program for staff members, utilizing the Performance Incentive Program (PIP) and Management Pay for Performance (MPP) programs to link individuals' performance goals to departmental objectives, and by the increased utilization of volunteers to provide staff support and substantial Internet use training for the public.

Finally, work with the Library Advisory Board will proceed to achieve the maximum amount of involvement and input from member cities and to develop a long-range strategy for specific future service enhancements.

During 2003, OCPL continued to expand and improve services to County residents. Items borrowed totaled 6,503,193 loans; attendance at programs increased by over 10,000 from the previous year; “24/7” on-line reference service to the public was provided; and new locations for tutoring in the READ adult literacy program were added.

In coming years, OCPL will be required to deal with changes in user demographics, legislative actions and technological advances. Future revenue factors will include not only the local economy and tax receipts but also possible actions by State government. While public libraries are frequently judged to be municipal service responsibilities, member cities have affirmed that their residents' best interests are served by remaining part of the OCPL system. With this context of voluntary participation, OCPL is well positioned to proceed toward meeting the technological and service challenges of the new century.

II. MISSION & GOALS

The Orange County Public Library (OCPL) is dedicated to the proposition that humanity is capable of improvement. The Library's Vision, Mission Statement and specific Goals support the belief that if County residents are able to access the information, data and intellectual content of our culture and heritage, they will be better able to make the decisions that form their lives and the community's future. More access to this information and data, as delivered by OCPL and facilitated by the Business Plan goals, will therefore enhance the quality of County residents' lives.

VISION

The Orange County Public Library will enhance the quality of life for all County residents by offering access to information that will meet all their cultural, civic, business and life long learning needs. OCPL will provide a framework for the delivery of relevant resources meeting their educational needs to residents of all ages in all member communities through a network of locally focused libraries. A knowledgeable, service oriented staff will provide access to information, books and other materials in a variety of formats utilizing contemporary technology which will encourage and foster reciprocal community involvement to educate, inform and enrich the lives of a diverse population.

MISSION STATEMENT

To enhance the quality of life for County residents by offering access to information and other resources for leisure opportunities, learning, business and community interaction.

GOALS

GOAL #1: PROVIDE OPPORTUNITIES FOR THE POPULATION TO MEET THEIR LEARNING AND LEISURE NEEDS THROUGH A VARIETY OF MEDIA AND DELIVERY SYSTEMS

Key Outcome Measure: Customer satisfaction and utilization of Library Services

Performance Measure	FY 02-03 Results	FY 03-04 Anticipated Results	FY 04-05 Plan
What: Measures amount of use by the public of library products and services.	<ul style="list-style-type: none">➤ 6,503,193 items borrowed➤ 132,113 children attended programs	<ul style="list-style-type: none">➤ 6,893,385 items borrowed (6%)➤ 134,755 children attended programs (2%)	<ul style="list-style-type: none">➤ 7,031,253 items borrowed (2%)➤ 138,889 children attended programs (3%)
Why?:	Identifies quantity of delivered services.		
How are we doing?:	Increases achieved in both areas.		

GOALS (CONT.)

Performance Measure	FY 02-03 Results	FY 03-04 Anticipated Results	FY 04-05 Plan
What: Conduct user and non-user survey.	➤ Due to reduction of State funding by \$1.2 million, project deferred one year	➤ Develop survey instrument and methodology	➤ Conduct survey, review & report results
Why?:	Identifies customer needs and desires.		
How are we doing?:	Commencing process.		

Performance Measure	FY 02-03 Results	FY 03-04 Anticipated Results	FY 04-05 Plan
What: Measures customer use of new technology to receive service products	➤ 430,000 hours of internet access provided to the public ➤ 397,166 remote Website connections	➤ 450,000 hours of internet access provided to the public ➤ 440,000 remote Website connections (10% increase)	➤ 475,000 hours of internet access provided to the public ➤ 485,000 remote Website connections (10% increase)
Why?:	Identifies return on technology investment.		
How are we doing?:	Public response exceeding projections.		

GOALS (CONT.)

GOAL #2:	PROMOTE AND FACILITATE COMMUNITY INTERACTION IN LEARNING, CULTURAL AND RECREATIONAL ACTIVITIES
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Key Outcome Measure: Progress in constructing library facilities on schedule and within budget.

Performance Measure	FY 02-03 Results	FY 03-04 Anticipated Results	FY 04-05 Plan
What: Measures our ability to complete construction plans providing facilities for library activity	<ul style="list-style-type: none">➤ Completed and opened Foothill Ranch branch➤ Began Wheeler Branch design➤ Began Construction Ladera Ranch Branch	<ul style="list-style-type: none">➤ Begin construction on Wheeler Branch➤ Opened Ladera Ranch Branch 8/03	<ul style="list-style-type: none">➤ Open Wheeler Branch 3/05
Why?	Growing population requires increased library infrastructure.		
How are we doing?	Projects on schedule.		

III. OPERATIONAL PLAN

CLIENTS

Potentially, all residents of the OCPL service area may be recipients of library services. Non-registered borrowers may visit library facilities and use materials and services in the building, and other persons may indirectly receive library services via research done at libraries by the news media, employees, or family members, etc.

A description of the recipients of the services provided by the Orange County Public Library is similar to demographics of the County as a whole, since the library serves the general public of all ages, from birth through the senior years, in 24 cities, and all unincorporated areas of the County.

The population for which OCPL is responsible is 1,459,866. Service recipients are located throughout Orange County, in all unincorporated areas and in those cities which are members of OCPL: Aliso Viejo, Brea, Costa Mesa, Cypress, Dana Point, Fountain Valley, Garden Grove, Irvine, Laguna Beach, Laguna Hills, Laguna Niguel, Laguna Woods, La Habra, La Palma, Lake Forest, Los Alamitos, Rancho Santa Margarita, San Clemente, San Juan Capistrano, Seal Beach, Stanton, Tustin, Villa Park, and Westminster. OCPL has reciprocal borrowing agreements with all other Orange County public libraries except those in the cities of Huntington Beach and Santa Ana.

OCPL libraries provide books, periodicals, online data bases, internet access, reference assistance, programs and other information sources to meet the learning, recreational, business, cultural and civic involvement needs of users of all ages.

CHALLENGES

Providing information sources that are current and relevant to the needs of users is a challenge OCPL meets by adding new materials and resources to its collections on a continuing basis and reviewing for currency existing resources. Individual branches must work to remain responsive to the specific needs of their service populations, and meet this challenge in part by utilizing the suggestions and recommendations of library patrons and the elected officials in those communities through the Library Advisory Board. Providing access to Library services must be done through contemporary technology meeting the expectations of the user population, requiring continual upgrading of the Library's technology infrastructure. OCPL is experiencing tremendous growth (over 500% increase in two years) in public use of the Library website.

OCPL must monitor changing community demographics and remain responsive to user needs in terms of languages included in our collections. Based on customer requests and demographic data Arabic, Farsi and Russian language materials are being added to the collection, which already includes materials in Spanish, Vietnamese, Chinese, and Korean, as well as English.

The Library also must strive to tie its overall service plan to the individual performance of staff members, and meets this requirement by linking individual staff members' efforts to the Business Plan and overall objectives through the Performance Incentive Program (PIP) and the Management Performance Program (MPP).

OCPL is a separate fund under the Board of Supervisors and operates at zero net County cost. Therefore, the department is reliant for its revenues primarily on local property taxes as distributed under State law. The economic recession and State budgetary shortfalls may cause a significant issue for OCPL due to possible re-distribution of tax monies by the State and further reduction to the Public Library Foundation Act funding from the State, which was cut by more than \$1.6 million over the past two years. OCPL will closely monitor developments in this area and will adjust spending plans as needed to maintain a balanced budget without drawing upon department reserves.

RESOURCES

In meeting the needs of Library users, OCPL draws upon the talents of approximately 500 full and part-time employees (as well as over 1,000 community volunteers), who provide services from 31 branch libraries. Acquisitions, cataloging, facilities management and other centralized services are managed from the Library Headquarters facility. Currently, over 2.5 million books are available from OCPL branches. The Library's automated system, which keeps track of circulation records and provides access to online databases, is housed at the County Data Center and connected via a high-speed network to all service outlets.

Property taxes currently account for 85 percent of the OCPL recurrent revenues. California Revenue and Taxation Code Section 95, as part of AB8 legislation, established County Free Libraries as Special Districts for property tax distribution purposes. The Library Fund is a distinct and separate fund in County government.

Charges for services, which include fines and fees, account for an additional four percent of recurring OCPL revenues. The remaining OCPL revenues consist of grants, donations, interest, and miscellaneous revenue.

OCPL has utilized Community Facilities (Mello-Roos) Districts and developer agreements to fund construction and equipping of the Rancho Santa Margarita, Aliso Viejo, Foothill Ranch, Wheeler (Irvine) and Ladera Ranch branch libraries.

STRATEGIES TO ACCOMPLISH GOALS

GOAL #1: PROVIDE OPPORTUNITIES FOR THE POPULATION TO MEET THEIR LEARNING AND LEISURE NEEDS THROUGH A VARIETY OF MEDIA AND DELIVERY SYSTEMS	
Strategies	<ul style="list-style-type: none">➤ Add 60,000 volumes to the materials available for public use➤ Add Arabic, Farsi and Russian language materials to the collection available➤ Install wireless access for patron PCs, PDAs, etc., in branches➤ Migrate staff and patrons online access to Windows XP operating system➤ Expand public utilization of OCPL Website remote access by the public

STRATEGIES TO ACCOMPLISH GOALS (CONT.)

GOAL #2: PROMOTE AND FACILITATE COMMUNITY INTERACTION IN LEARNING, CULTURAL AND RECREATIONAL ACTIVITIES	
Strategies	<ul style="list-style-type: none">➤ Complete construction of Wheeler Branch Library (Irvine)➤ Upgrade Energy Management System (EMS) at all branches, within available budget➤ Investigate three year plan for retrofitting lighting fixtures in branches➤ Perform controlled facilities needs inspections at branches

KEY OUTCOMES MEASURES

GOAL #1 STRATEGIES

♦ ADD 60,000 VOLUMES TO THE MATERIALS AVAILABLE FOR PUBLIC USE			
Performance Measure	FY 02-03 Results	FY 03-04 Anticipated Results	FY 04-05 Plan
What?: Number of items added	➤ Added 58,280 items	➤ Add 60,000 items	➤ Add 60,000 items
Why?:	Measures how many new resources are provided to users.		
How are we doing?:	Acquisition rate for 2002-03 was 48% below previous year; no increase anticipated before FY 2005-06.		

♦ ADD ARABIC , FARSI AND RUSSIAN LANGUAGE MATERIALS TO THE COLLECTION AVAILABLE TO THE PUBLIC			
Performance Measure	FY 02-03 Results	FY 03-04 Anticipated Results	FY 04-05 Plan
What: Number of items added	➤ Added 200 items in each language	➤ Add 100 items in each language	➤ Add 100 items in each language
Why?:	Measures how many resources added.		
How are we doing?:	Currently on schedule.		

KEY OUTCOMES MEASURES (CONT.)

GOAL #1 STRATEGIES

♦ REPLACE CURRENT INTEGRATED LIBRARY SYSTEMS WITH STATE-OF-THE-ART SYSTEM			
Performance Measure	FY 02-03 Results	FY 03-04 Anticipated Results	FY 04-05 Plan
What?: Fund, select and install new system	➤ Negotiated contract and installed system	➤ Further integrate system	➤ Install wireless patron device access in branches
Why?:	Measures success in meeting implementation targets.		
How are we doing?:	On schedule.		

♦ MIGRATE STAFF AND PATRON ONLINE ACCESS TO WINDOWS XP OPERATING SYSTEM			
Performance Measure	FY 02-03 Results	FY 03-04 Anticipated Results	FY 04-05 Plan
What?: Percentage of terminals converted	➤ Completed Windows 2000	➤ Operating Windows 2000	➤ Migrate to Windows XP
Why?:	Measures progress for migration of 700 computer terminals.		
How are we doing?:	On schedule.		

KEY OUTCOMES MEASURES (CONT.)

GOAL #1 STRATEGIES

◆ EXPAND PUBLIC UTILIZATION OF OCPL WEBSITE REMOTE ACCESS BY THE PUBLIC			
Performance Measure	FY 02-03 Results	FY 03-04 Anticipated Results	FY 04-05 Plan
What?: Number of online connections	➤ 397,166 connections	➤ 440,000 connections	➤ 485,000 connections
Why?:	Measures public use of service.		
How are we doing?:	Experiencing 10% increase in current fiscal year.		

KEY OUTCOMES MEASURES (CONT.)

GOAL #2 STRATEGIES

- ◆ OPEN FOOTHILL RANCH BRANCH BY MARCH 1, 2003
- ◆ BEGIN CONSTRUCTION OF WHEELER BRANCH BY APRIL 1, 2004
- ◆ COMPLETE EXPANSION OF EL TORO BRANCH BY APRIL 1, 2003
- ◆ OPEN LADERA RANCH BRANCH BY AUGUST 2003
- ◆ COMPLETE YEAR THREE OF ADA COMPLIANCE PLAN BY JUNE 30, 2003

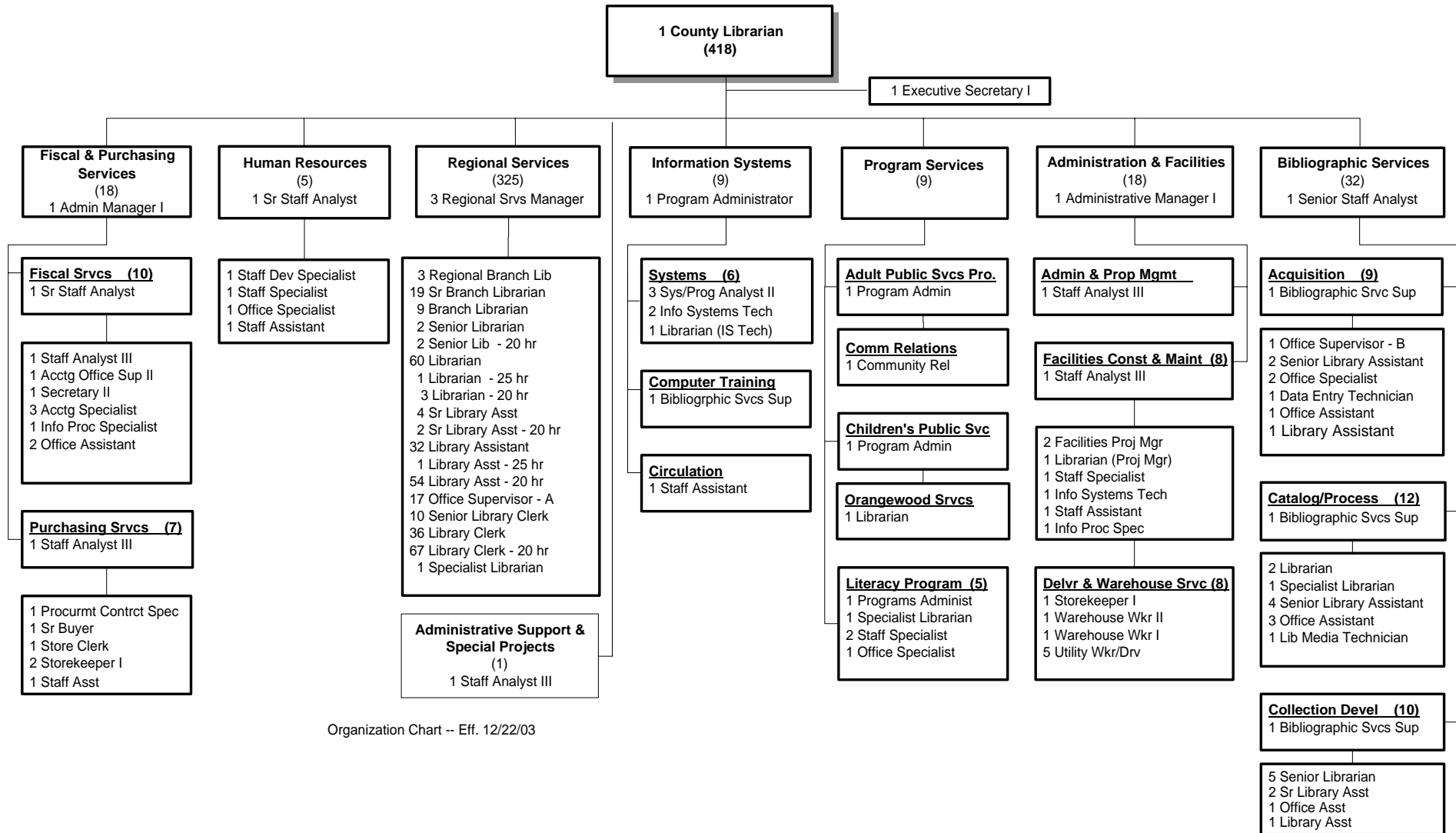
Performance Measure	FY 02-03 Results	FY 03-04 Anticipated Results	FY 04-05 Plan
What?: Completion of projects on schedule and within budget	<ul style="list-style-type: none">➤ Wheeler branch designed➤ Ladera Ranch completed & opened➤ Foothill Ranch completed & opened➤ El Toro expansion completed	<ul style="list-style-type: none">➤ Wheeler branch begin construction, 4/04➤ Ladera Ranch branch opened, 6/03	<ul style="list-style-type: none">➤ Wheeler open branch, 4/05
Why?:	Measures success in efficiently meeting user expectations.		
How are we doing?:	Projects currently on schedule.		

IV. APPENDICES

See attached documents:

ORGANIZATION CHART.	ATTACHMENT A
MANAGEMENT TEAM	ATTACHMENT B
LABOR MANAGEMENT COMMITTEE.....	ATTACHMENT C
BUSINESS PLAN TEAM	ATTACHMENT D
ACCOMPLISHMENTS.....	ATTACHMENT E

ORANGE COUNTY PUBLIC LIBRARY



Organization Chart -- Eff. 12/22/03

APPENDIX B — MANAGEMENT TEAM

Management Team Member	Position Title
John Adams	County Librarian
Christine Eastwood	Director, Administration & Facilities
Clyde Gamboa	Director, Information Systems
Kathy Tahilramani	Director, Human Resources
Dave Sankey	Director, Fiscal & Purchasing Services
Lynn Eisenhut	Southern Regional Manager
Dan Josslin	Northern Regional Manager
Georgia Weddle	Central Regional Manager
Laura Peters	Manager, Purchasing Services
Helen Fried	Manager, Bibliographic Services
Steve Siemion	Manager, Fiscal & Business Services
Marcia Tungate	Literacy Services Coordinator
Sharon Henegar	Program Administrator, Children Services
Renee Welling	Program Administrator, Adult Services

(Rev. 12-22-03)

APPENDIX C – LABOR MANAGEMENT COMMITTEE

LABOR MANAGEMENT COMMITTEE	POSITION TITLE
Kathy Tahilramani	Director, Human Resources
Dan Josslin	Northern Regional Manager
Tangela Barnes	Specialist Librarian/READ
Georgia Weddle	Central Regional Manager
Loretta Farley	Senior Branch Librarian
Lou Porras	OCEA

(Effective 12-22-03)

The OCPL Labor Management Committee met several times during the year to discuss workplace issues and develop a communication plan.

APPENDIX D — BUSINESS PLAN TEAM

Business Plan Team	Position Title
John Adams	County Librarian
Christine Eastwood	Director, Administration & Facilities
Clyde Gamboa	Director, Information Systems
Kathy Tahilramani	Director, Human Resources
Dave Sankey	Director, Fiscal & Purchasing Services
Lynn Eisenhut	Southern Regional Manager
Dan Josslin	Northern Regional Manager
Georgia Weddle	Central Regional Manager
Helen Fried	Manager, Bibliographic Services
Laura Peters	Manager, Purchasing Services
Steve Siemion	Manager, Fiscal & Business Services
Marcia Tungate	Literacy Services Coordinator
Sharon Henegar	Program Administrator, Children Services
Renee Welling	Program Administrator, Adult Services
Laura Lynch	Executive Secretary

(Rev. 12-22-03)

APPENDIX E — ACCOMPLISHMENTS

ANTICIPATED ACCOMPLISHMENTS	
Goals:	Progress:
ϕ Increase children's program attendance by 9%	ϕ Attendance increased by 9.5%, for a total of 132,113 children
ϕ Increase internet use total hours by 5%	ϕ Increase is projected for 6%, to 430,000 hours
ϕ Open Foothill Ranch Branch Library by February 2003	ϕ Branch opened February 1, 2003
ϕ Complete design and plans check for Wheeler Branch Library	ϕ On target to start construction in first quarter of 2004

ADDITIONAL AND UNANTICIPATED ACCOMPLISHMENTS	
ϕ	Staff training needs assessment and plan completed
ϕ	Third cycle of Performance Incentive Program completed
ϕ	Ladera Ranch Branch opened
ϕ	New automated system installed
ϕ	Young Adult Programming series successfully expanded with a program attendance of over 5,000 teenagers Countywide

(Rev. 12-22-03)